

PENSION SYSTEM RESUMPTION (PSR) PROJECT
JANUARY STATUS REPORT
February 19, 2009

	Task	Start	Finish	Status	Risks/Issues
1	Pension System Resumption (PSR) Project	02/09/05	04/19/10	<ol style="list-style-type: none"> 1. The State Controller's Office (SCO) terminated its contract with BearingPoint, Inc. on January 6, 2009 and is currently working with the Department of General Services to develop a new procurement strategy. In order to mitigate risk to CalPERS, the Team has developed a contingency that allows the PSR solution to work with SCO's legacy payroll reporting format; however, there are a number of risks and resource issues related to the contingency that remain to be resolved. Discussions are underway with the SCO regarding changes to their legacy operations that would improve the implementation of the contingency. 2. The City of Santa Ana participated in the initial testing of PSR's new employer contribution reporting process. Using test payroll contributions, they worked collaboratively with the PSR Team to identify data/format issues. In the coming months, the PSR Team will work with San Bernardino County Superintendent of Schools to test retirement enrollment transactions and California State University Chancellor's Office to test health enrollment. 3. The PSR Team completed the Detailed Design for the Financial System Integration Project according to schedule; development of the functionality for customer accounts, payments, and invoices is underway. 4. The high-level strategy for implementing PSR is complete; efforts are underway to identify the required activities and develop the detailed Implementation Plan. Implementation Coordinators for the business and technology areas kicked off the 	<ol style="list-style-type: none"> 1. With the postponement of the 21st Century Project, SCO may not be able to provide all of the data PSR expects to receive (e.g., CalPERS unique identifier, retired annuitant hours worked, tax deferred contribution details, Supplemental Investment program data). CalPERS continues to work with SCO to minimize impacts.

PENSION SYSTEM RESUMPTION (PSR) PROJECT
JANUARY STATUS REPORT
February 19, 2009

	Task	Start	Finish	Status	Risks/Issues
				<p>effort with an overview of the implementation plan's goals, objectives and timelines.</p> <p>5. The business requirements for integrating PSR with the existing my CalPERS were completed in December. Under PSR, the new my CalPERS Home Page will extend today's participant services to include business partners as well as provide the ability to create content dynamically and customize messages for different user groups. The business requirements for the enhanced my CalPERS Customer Education Center are currently being developed and are scheduled to complete in February.</p>	
2	Enterprise Transition Management (ETM) Project	7/30/07	10/19/10	<p>1. The ETM Team is meeting with Division Leadership to summarize the staffing implications resulting from the duty statement working sessions. The team continues to identify specific impacts and develop transition management strategies to address them.</p> <p>2. The second Change Readiness Assessment was administered to CalPERS staff; analysis of the results will begin in early February. This data will be used to design communication and transition support activities to address division-specific change readiness needs.</p> <p>3. The Team is facilitating system demonstrations at section and unit level meetings. These demonstrations simulate "real world" scenarios, specific to each program area, in an effort to give staff a better understanding for how their work will be done differently in the new environment.</p>	<p>1. The consolidation and redesign of the 10 core IT processes represents major change within ITSB and is proving to be a larger effort than originally anticipated. IT Leadership has introduced additional coaching sessions to assist staff in understanding the value of and business reason for making the process changes.</p>

PENSION SYSTEM RESUMPTION (PSR) PROJECT
JANUARY STATUS REPORT
February 19, 2009

	Task	Start	Finish	Status	Risks/Issues
3	Public Employer Readiness Team (PERT)	03/01/08	05/17/10	<ol style="list-style-type: none"> 1. PERT completed the effort to identify preferred Employer reporting methods by December 31st as planned; results indicate nearly 500 Employers plan to submit enrollment or payroll data to CalPERS via electronic file transfer. The data collected during this effort will be used to build Employer test plans and environments, as well as provide the foundation for the next phase of the Employer Education campaign. 2. PERT presented 48 educational Web conferences in Phase One to help employers make the best reporting choices for their agencies. Upon completion of Phase One, a survey was conducted to determine the effectiveness of the outreach and training; PERT received 879 responses to the survey representing a 59% response rate. Regarding the Web conferences, survey comments indicated that Employers liked the convenience of web conferencing as well as the Question and Answer portion of the presentation. 3. PERT is working with the Employer Services Division (ERSD) to jointly develop a process for Employer-related content discovery, curriculum definition, education materials, and script development. With a structured approach for knowledge transfer, PERT and ERSD will be in a better position to support Employers through testing and training activities. 	<ol style="list-style-type: none"> 1. Some Employers may not be able to comply with the new reporting requirements for enrollment and contribution data by PSR "go live". Efforts are underway to assess magnitude of risk and identify contingencies.